



On-line Tutorial Series

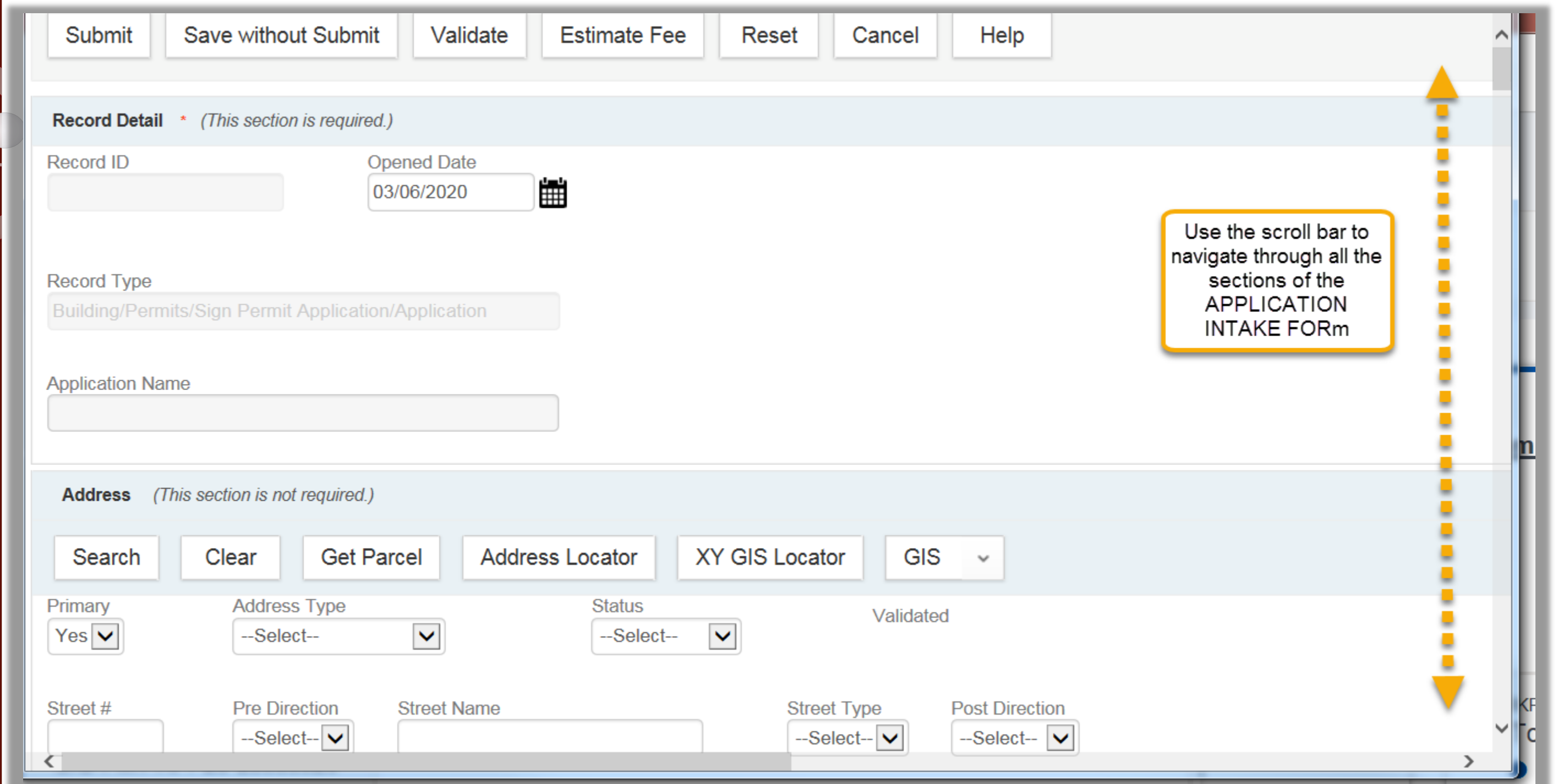
Module Five

The APPLICATION INTAKE form

Custom Lists, Custom Fields

Uploading Documents

The APPLICATION INTAKE form



The screenshot shows the APPLICATION INTAKE form interface. At the top, there is a row of buttons: Submit, Save without Submit, Validate, Estimate Fee, Reset, Cancel, and Help. Below this, the form is divided into sections. The first section is 'Record Detail' with a red asterisk and the text '(This section is required.)'. It contains fields for Record ID, Opened Date (03/06/2020), Record Type (Building/Permits/Sign Permit Application/Application), and Application Name. The second section is 'Address' with the text '(This section is not required.)'. It contains buttons for Search, Clear, Get Parcel, Address Locator, XY GIS Locator, and a GIS dropdown menu. Below these buttons are fields for Primary (Yes), Address Type (--Select--), Status (--Select--), Validated, Street #, Pre Direction (--Select--), Street Name, Street Type (--Select--), and Post Direction (--Select--). A vertical scroll bar is on the right side of the form. A yellow dashed arrow points upwards from the bottom of the scroll bar to the top of the form. A yellow callout box with a black border contains the text: 'Use the scroll bar to navigate through all the sections of the APPLICATION INTAKE FORM'.

Submit Save without Submit Validate Estimate Fee Reset Cancel Help

Record Detail * (This section is required.)

Record ID Opened Date 03/06/2020

Record Type Building/Permits/Sign Permit Application/Application

Application Name

Address (This section is not required.)

Search Clear Get Parcel Address Locator XY GIS Locator GIS

Primary Yes Address Type --Select-- Status --Select-- Validated

Street # Pre Direction --Select-- Street Name Street Type --Select-- Post Direction --Select--

Use the scroll bar to navigate through all the sections of the APPLICATION INTAKE FORM

This is the application intake form. Custom Fields and Custom Lists sections are unique to each record-type.

The APPLICATION INTAKE form

Shown below are examples of a Custom Fields and Custom Lists sections of an APPLICATION INTAKE FORM.

Custom Fields

STREET NAME CHANGE APPLICATION
Number of Lots for Public Notice *
 (Number)

PC STREET NAME CHANGE
Staff Recommendation

[check spelling](#)

Notices Mailed Completed
☐ Yes ☐ No

Notices and Legal Ad Due Date

Legal Notice Completed
☐ Yes ☐ No

CC STREET NAME CHANGE
Staff Recommendation

[check spelling](#)

Notices Mailed Completed
☐ Yes ☐ No

Notices and Legal Ad Due Date

Legal Notice Completed
☐ Yes ☐ No

HDRC STREET NAME CHANGE
Staff Recommendation

[check spelling](#)

Notices Mailed Completed
☐ Yes ☐ No

Notices and Legal Ad Due Date

Legal Notice Completed
☐ Yes ☐ No

The Custom Fields section of the APPLICATION INTAKE form is unique to the Record Type.

Custom Lists

STREET NAME REQUEST INFO + Add - Delete

☐ Type of Request *

Existing Street Name(Text) *

-Select-

GIS JURISDICTIONS
☐ Type(Text)

GIS LAND DEVELOPMENT
☐ Type(Text)

GIS ZONING BASE
☐ Base Zone(Text) Case Number(Text)

GIS ZONING OVERLAY
☐ Type(Text)

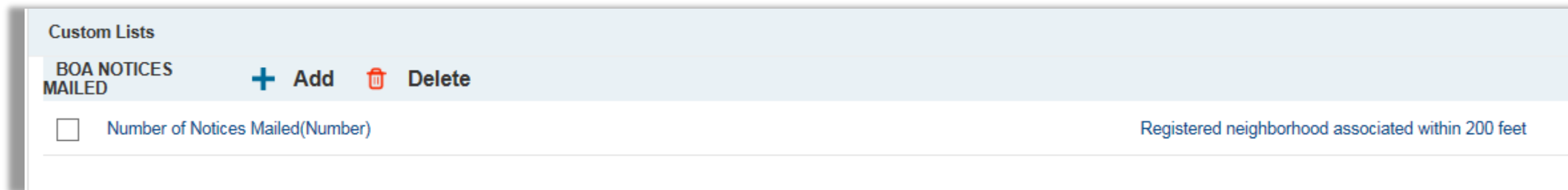
The Custom Lists section of the APPLICATION INTAKE form is unique to the Record type.

Reason(Text Area) *

[check spelling](#)

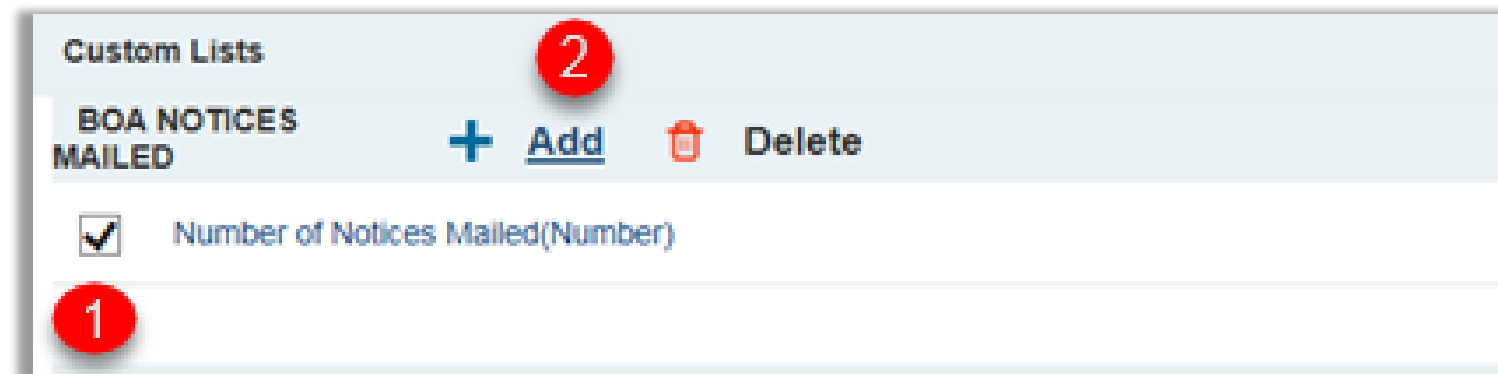
Adding Fields to Custom Lists

1. Begin at Custom Lists section of the APPLICATION INTAKE form.



Custom Lists	
BOA NOTICES MAILED	+ Add Delete
<input type="checkbox"/> Number of Notices Mailed(Number)	Registered neighborhood associated within 200 feet

2. Click the box to the left of the field you want to expand.



Custom Lists	
BOA NOTICES MAILED	+ Add Delete
<input checked="" type="checkbox"/> Number of Notices Mailed(Number)	

Adding Fields to Custom Lists

3. Click Add. 

4. Text box is added. Type information.

Custom Lists

BOA NOTICES
MAILED

+

Add

🗑

Delete

☒

Number of Notices Mailed(Number)

Registered neigh

☒

88

☒ Yes

☐ No

Deleting added fields in the Custom Lists section

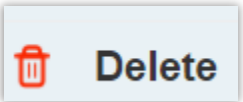
Deleting An Added Field

- 1. Begin at the Custom Lists section of the APPLICATION INTAKE form. Click the box to the left of the field you want to delete.

Custom Lists

BOA NOTICES MAILED	+ Add	🗑 Delete
<input type="checkbox"/> Number of Notices Mailed(Number)		Registered neighborhood ass
<input checked="" type="checkbox"/> 88		<input type="radio"/> Yes <input checked="" type="radio"/> No

- 2. Click Delete.



Uploading documentation

- ❖ *Documentation may be deleted only before the APPLICATION INTAKE FORM is submitted. After the form is submitted, documentation becomes part of the historical referencing of the record and is never to be deleted.*

Uploading documents

The Documents section of the APPLICATION INTAKE FORM is used for uploading documents. All documents must be scanned and uploaded. Note that this section is required for some applications. One or multiple documents may be uploaded at the same time.

Documents * (This section is required.)

This application type requires you to submit the following document types in the document group: BOA. Subject to the collected information, you may be required to submit additional documents prior to approval. Original Application, Site Plan, Tax Appraisal Details, Proof of Ownership, Property Deed.

Source

<input type="checkbox"/>	File Name	Document Name	Document Group/Category	Description	Also Attach To	Size	Type	Modified Date	Modified By	Source	User E-mail	Department	Virtual Folders
0 record(s) found.													

This is an example of an application requiring documentation. Note the red asterisk (*).

BuildSA displays the required documentation.

Documents (This section is not required.)

Source

<input type="checkbox"/>	File Name	Document Name	Document Group/Category	Description	Also Attach To	Size	Type	Modified Date	Modified By	Source	User E-mail	Department	Virtual Folders
0 record(s) found.													

This is an example of an application NOT requiring documentation.

Uploading documents

To add (upload) a document to the **APPLICATION INTAKE FORM**

- 1. In the Documents section of the **APPLICATION INTAKE** form, click the **Add** button.

Documents * *(This section is required.)*

Add

Look Up

Delete

This application type requires you to submit the following document types in the document group: **LAND_PLAT_BSL**. Subject to the collected information, you may be required to submit additional documents prior to approval.**Original Application, Plat.**

Source

FILENET

☐

File Name

Document Name

Document Group/Category

Description

Also Attach To

Size

Type

Modified Date

Modified By

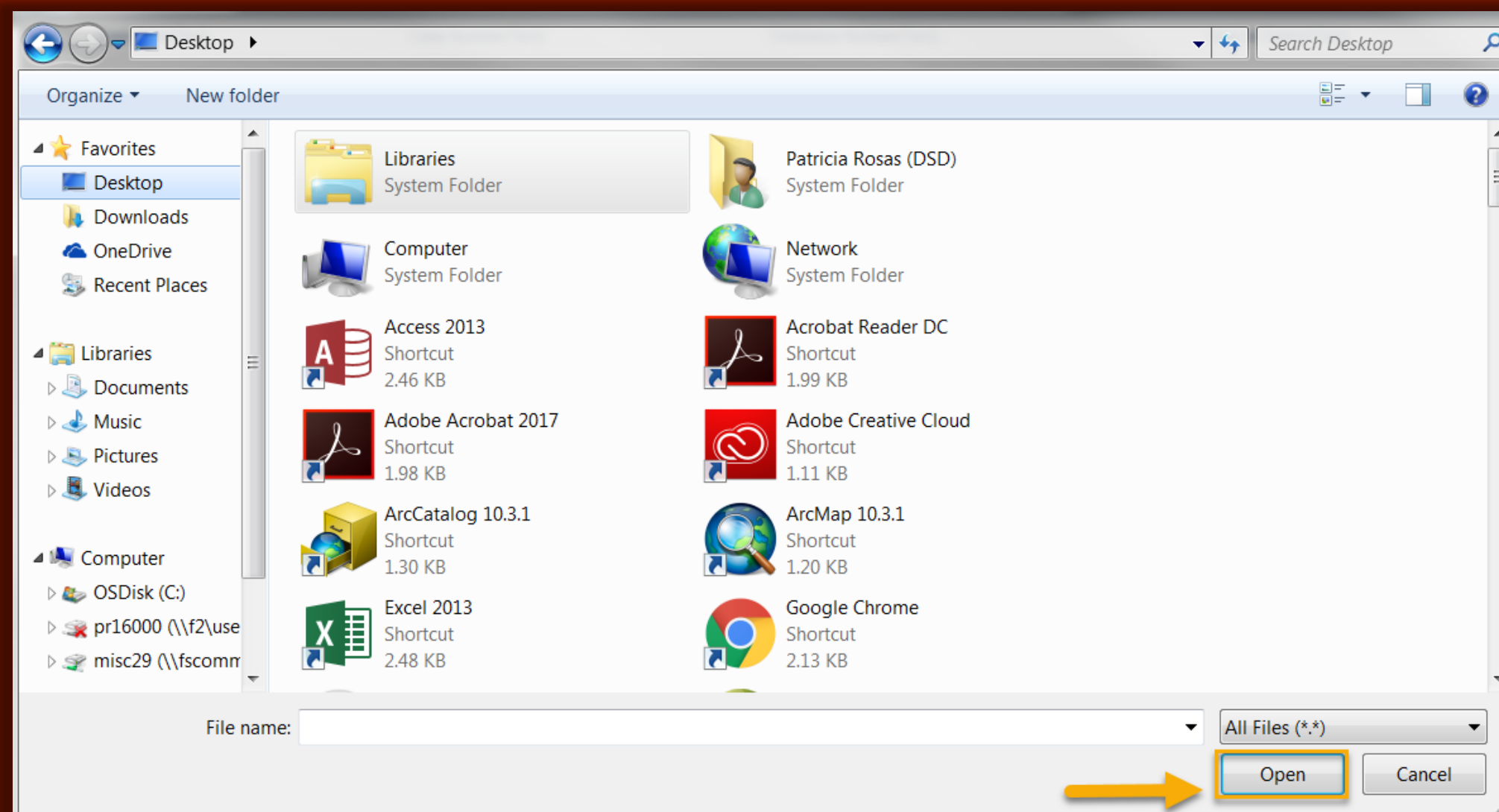
Source

U

Uploading documents

2. The Windows Explorer window displays. Locate and click to select the file(s) to upload.

3. Click Open.



Uploading documents

- 4. File is uploaded. Select Group/Category type from the drop-down menu options.
- 5. Type brief description of document in Description text box (optional). Repeat steps for all documentation uploaded.

Documents

This section is required.)

AddLook UpDelete

This application type requires you to submit the following document types in the document group: LAND_PUD. Subject to the collected information, you may be required to submit additional documents prior to approval.Original Application, Plan in AutoCad, Storm Water Management Plan, Traffic Impact Analysis (TIA) Worksheet.

SourceFILENET

<input type="checkbox"/>	File Name	Document Name	Document Group/Category	Description	Also Attach To	Size	Type	Modified Date	Modified By	Source	User E-mail	Department	Virtual Folders
<input type="checkbox"/>	BuildSA Poster_FINAL.jpg		LAND_PUD	Type brief description here.	--Select--		FILENET				Land Entitlements Admin Support	Current Department	

1

2

3

Deleting Uploaded Documents

The left screenshot shows a web application interface with a top navigation bar containing 'Add', 'Look Up', and 'Delete' buttons. The 'Delete' button is highlighted with a yellow border. Below the navigation bar, there is a section titled 'Documents' with a note '(This section is required.)'. A message states: 'This application type requires you to submit the following document types in the document group: LAND_PUD. Subject to the collected information, you may be required to submit additional documents prior to approval. Original Application, Plan in AutoCad, Storm Water Management Plan, Traffic Impact Analysis (TIA) Worksheet.' Below this, there is a 'Source' dropdown menu set to 'FILENET'. A table with columns 'File Name', 'Document Name', 'Document Group/Category', 'Description', and 'Also Attach To' is shown. A document entry is visible with a checked checkbox, 'BuildSA Poster_FINAL.jpg', 'LAND_PUD', 'Habitat Compliance Form', and a description field. A 'check spelling' link is also present.

The right screenshot shows a similar interface but with a different document entry. The 'Source' dropdown is set to 'FILENET'. The 'Document Group/Category' dropdown is set to 'Land Entitlements Admin Support'. The 'Current Department' dropdown is set to 'Current Department'.

1. Click the box to the left of the document.

2. Click Delete. * *Documents may be deleted only before the APPLICATION INTAKE FORM is submitted. After the form is submitted, documents become part of the record's historical referencing and are never to be deleted.*

Congratulations!

This concludes Module Five

Custom Lists, Custom Fields

Uploading Documents

It is time to test your recall.....

TEST YOUR RECALL

1. The APPLICATION INTAKE FORM has a Custom Lists and a Custom Fields section. ____ True ____False
2. Documents uploaded before the APPLICATION INTAKE FORM is submitted may be deleted. ____ True ____False
3. All documentation uploaded must be scanned. ____True ____False
4. The Documents section of the APPLICATION INTAKE FORM lists the documentation required per the Record Type. ____True ____False

Answers on the next slide...



1. True
2. True
3. True
4. True

Time to begin
the next
module...

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